

The Job Shop Manufacturing Playbook for AE's and SE's

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Playbook for Manufacturing Prospects

Document Overview

The purpose of this document is to align you with your manufacturing prospects. We intend to give a high level overview of the types of manufacturers, insight into the kinds of questions you should ask, the needs of manufacturers, ERP integration and needs, and a way to approach the sales cycle. It is not and will never be entirely complete, but it will give your team ideas on how to approach these clients and make a better, more “in tune” sales cycle.

1. Types of Manufacturing clients

There are many types of manufacturers, but for the purpose of a Sales Cycle – and for how we begin the scoping conversations, we are breaking them down into 4 distinct types:

- ◆ **Repetitive Manufacturing and Distribution** – basically “Widget” manufacturers. With its requirements for setup being minimal or having little changeover, the operation speeds can be increased or decreased to meet customer demands or requirements. Customers order products from these Prospects periodically based on demand, and these prospects warehouse their own goods in anticipation of customer orders. Product volume in this space is typically high and product is shipped in cases or even pallets. *Prospects in this segment make items like Consumer goods (Kitchen Utensils, etc.) or Food products.*
- ◆ **Discrete Manufacturing** – Like repetitive manufacturing, discrete manufacturing also utilizes an assembly or production line. However, this process is extremely diverse, with a variation of setups and changeover frequencies. Prospects in this space typically produce order lots based on individual production orders. Like Repetitive manufacturing, products produced as a result of Discrete manufacturing Prospects are high volume – in cases, or pallets, however, a customer typically places an order BEFORE the production of the item begins. *Prospects in this segment make items like OEM Car parts (Brake Pads, etc.), High Tech (Circuit boards, etc.) or custom packaging for consumer brands.*
- ◆ **Job shop manufacturing** - unlike repetitive or discrete manufacturing, produces made-to-order (MTO) or made-to-stock (MTS) items. These items are HIGHLY CONFIGURABLE, with multiple product “Options” and are typically produced in small batches or singularly. The production of their products are so highly customized that the production line is essentially reset each time a new product is produced. *Prospects in this segment make items such as heavy machinery, custom sized equipment (doors) or Equipment used in other manufacturing processes (Spoolers, wire, etc.).*
- ◆ **Process manufacturing (or continuous manufacturing)** – This is similar to repetitive manufacturing as it also runs 24/7. The difference is that this manufacturing process produces raw materials such as gases, liquids, powders, or slurries. *Prospects in this segment make items such raw materials for Plastics, chemicals or fabric.*

We will review the considerations for these prospects in detail in the next sections



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2. Job Shop Manufacturing Prospects

Account Management Needs

Job Shop Manufacturers are builders of highly configurable products. These products can and usually do take days or even weeks to configure for a specific customer. Each Product is typically Made to Order (MTO) or Made to Stock (MTS) if the prospects' clients depot goods at the prospect location.

These prospects engage their clients in long, involved sales cycles – similar to High Tech or Medical (HLS) cycles, and will use Opportunities to manage these sales cycles and interactions.

Our Prospect's Account Reps will strive to be on site with their clients often, but will also spend some time in the office. Who to visit (and how often) is mostly driven by Opportunities, but road trips need to be productive so using **Maps** can help (see below). The decision about how to visit can be built on pending Opportunities, total sales volume and client support issues.

Our Prospect's Account Managers are typically responsible for new Lead Generation but likely have a Marketing Team around them who are driving potential leads to their Website and engaging with them with White Papers and other content. These are complex machines, and so education is likely the first step in the sales cycle, even if that happens without the rep. That said, visiting qualified leads will be an important step in the process, it's just that the qualification is likely the creation of an Opportunity.

How can we help?

- Using base Salesforce Views we can show data regarding last visit, Open Opportunities, Opportunity Size and targeted Close Date
- Using **Maps** to help Account Reps to find new business while on the road could also help. Seeing early stage Opportunities nearby, qualified leads, or other records could give the Rep a more quality road trip.
- Mobile experience could be important – especially for Lead Management and Opportunity updates (similar to you being on the road and updating Opportunities as you leave clients). This sales cycle will feel very familiar to you as a Rep. And in these kinds of sales cycles, there are a ton of next steps that happen after a visit.
- Using base activity management and mobile experience, we can record trip outcomes, record next steps, and track basic expenses like mileage or meals. For Prospects in our space, we shouldn't get too technical in the beginning (Concur) so keep it simple.
- Opportunity Management will be a key component to Job Shop Manufacturers. These are long and complex Sales Cycles – often requiring multiple engineering drawings, configuration capture and Implementation plans.
- Finally, workflows and approvals can help our prospects to alert and confirm trips, outcomes or Opportunities for their leads and customers.



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Data Analysis Needs

Data analysis from ERP is not always a pressing needs with Job Shop Manufacturers, however, some of our Job Shop Prospects will also sell the materials that are used in the machine and in that case, ERP Integration can be important. Think of a company that makes hi-speed spoolers, and sells the Spools and the wrap as consumables for the machine.

We can solve for this by bringing that data into Salesforce and using basic reports and dashboards as a start. Eventually, if **Tableau** ever becomes a thing, we could it to get to the next level.

However, writing BACK to ERP could be a huge advantage. If we go to all the trouble of building out a complex Quote (See below) if we can send those details back to ERP to create the Sales Order, that could dramatically reduce the data entry requirements for the client.

If the system is a newer ERP (Microsoft GP, SAP, NetSuite, etc.) we can use the system API to send Sales Orders TO ERP.

How can we help?

- With **Enterprise Edition**, we could integrate to their ERP and pick up critical Sales and if necessary, inventory information.
- **Mulesoft** is a possibility, but the pricing typically removes the tool as a possibility. We can and have used Middle ware to do the integration, BUT, in our opinion, we are better served writing APEX code to do the integration. ***We believe that we can do most integrations for between \$12K and \$15K one time (not counting the rest of the project)***. Middleware such as [Jitterbit](#) or [Informatica](#) can START at \$20,000 a year.
- And by using this information in Salesforce Reports and Dashboards, we could deliver this analysis to the Account Reps' pocket. They can use this information to analyze sales by Product, by time (This Year/Last Year), by category – really anything we can get from ERP. We can do Gross Margin Analysis if the cost of goods can be sent in the integration, we can analyze product mix if the category can be sent. Really anything they want to see, if they can get us the data, we can draw at the account level, and then for the company/rep/time period



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Quote Preparation Needs

Quoting and Opportunity Management can be a huge advantage to clients like this. Most of our Job Shop Prospects build highly configurable quotes for customers, highlighting custom builds for products, product options and service items such as Maintenance or Implementation.

If the prospects do quoting in a spreadsheet, we want a copy of that. **CPQ** is almost always a fit for these customers, but we will need to understand how complex the quoting function is. Key to scoping (and pricing) these kind of **CPQ** projects are:

- Bundles – how many configurable products are there? And how different are they?
- Documents – does the prospect have different documents they deliver in the Sales Process? Quote? Proposal? Maintenance Agreements? Understanding the volume and complexity of these documents can be key

In addition, customers may want to see multiple versions of a quote before deciding which way to go. **CPQ** gives us the ability to manage this.

Project Needs

Most Job Shop Prospects have an implementation component to the sales process. This can be handled by in house PM's or by outside Partners or contractors.

The complexity of a project can vary from a simple tracking mechanism (Shipped, installed, configured, complete) to a multiple level project with several milestones and tasks. Digging into this complexity will determine the scope of the Project Piece and as a result to overarching costs.

How can we help?

- We can build out a Custom Project function, or add one of the free tools (Milestones PM). If the project needs are really complex, then we may want consider moving towards a Task Ray implementation, although that adds time and cost. At the very least, getting Project users on board *should add users to the license count.*

Customer Support Needs

The typical Job Shop Prospect will have a maintenance function that could represent a significant source of revenue for the company. These maintenance needs can be handled in multiple ways - from in house service reps, to field service reps to contractors or partners. If the prospect schedules, tracks and bills for these service calls, **FSL** is a good candidate for them.

How can we help?

- We can help to build out **FSL** for the Prospect. Usually for the size of prospects we are dealing with, we will be replacing a Spreadsheet, or a White board, so a simple approach can be a huge improvement on the existing function.
- BUT, we need to understand that while spreadsheets are a mess, and don't give clients any meaningful data, they sure are easy to manipulate! We need to start at the beginning, drilling into the prospect that this will be an **ENORMOUS** change for the field techs and their dispatch users.
- Framed properly, and getting buy in from the prospect early, we can transform their Field Service function using **FSL**. However if we sell it as an easy to install panacea, we will be in trouble almost immediately.

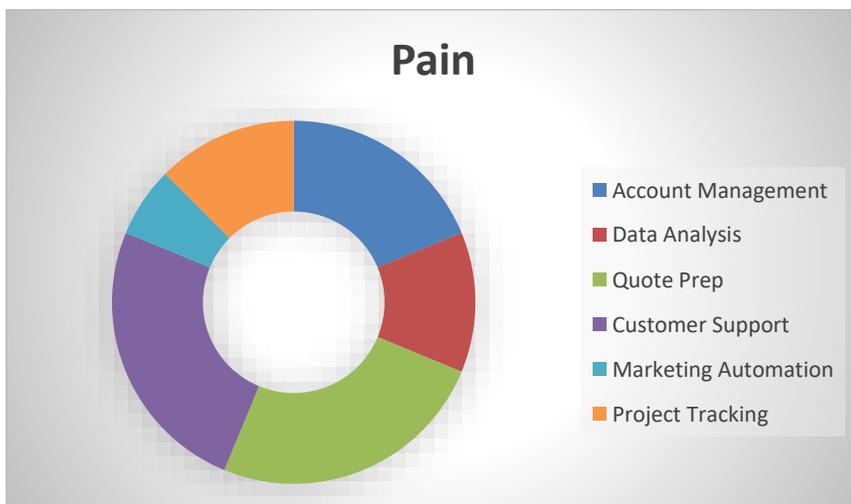
Marketing Automation Needs

Marketing for these kind of customers is more face to face and person to person than digital. That said, they are probably delivering or would like to deliver educational information about their products to customers. Getting a prospect to self-identify in order to download a White Paper would give our Prospect a leg up in turning the prospect into a Customer.

When a Lead Self Identifies, we can use the Pardot connection to send that to Salesforce, assign the lead to a Rep and have them qualify the lead. We can also build Drip campaigns for leads who self-identify – sending them periodic updates or white papers, or whatever the Prospect can come up with. **NOTE –the Prospect will need to be in a position to create this content. We won't be able to do this for them, but if the Content is available, we can help deliver that content to the leads.**

Understanding the Need

We call this the “Rotation of Neglect”! Which of these business process is the most important initially? Knowing the biggest pain point can help us to determine the initial approach, AND can help us with future Opportunities with the Prospect once they become a client:





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Scoping Questions

- ◆ Are you doing ANY CRM activities? (Tracking Calls, etc.) If so, how? (CRM, Spreadsheet, Outlook). I bet they hate it if they do!
- ◆ How do you decide when (and who) to Visit? Is there any data analysis when trips are scheduled?
- ◆ How do you report meeting outcomes? How do you communicate next steps? Do you need other resources to help? (Event coordinators, category managers, etc.)
- ◆ How do you track, Manage and move Sales Opportunities forward?
- ◆ How much of your business is New Clients vs Existing Clients
- ◆ How do you quote new products for existing customers? What is the process? Who is Involved from your side?
- ◆ Do you sell both Equipment AND consumables related to that Equipment?
- ◆ If so, how are each of the Sales Processes Managed?
- ◆ How do you quote new products for Leads? What is the process? Who is Involved from your side?
- ◆ What is your ERP System?
- ◆ How is your product configured? Do you identify optional products or configurations independently?
- ◆ Do Optional products or configurations change the price of a product?
- ◆ How do you identify new Leads? How do you engage with them?
- ◆ Do you engage in Digital Marketing with your customers or Leads? If not, is this a priority for 2020?
- ◆ Do you provide (or sell) Maintenance on your products?
- ◆ How is that Maintenance Provided?
- ◆ Do you have Field Service Reps who make Service calls on your product?
- ◆ Is this a Profit Center for your firm?
- ◆ What kind of data do you need on the road? Is the data in ERP? Outlook? Spreadsheets?
- ◆ How do you collaborate within the company? (Quip, Chatter, etc.)
- ◆ How do you assign Accounts and/or Leads? Is there a geo distribution?
- ◆ If a Rep leaves, how do you “Institutionalize” the account relationship history? (I bet they don’t!)

Challenges and Risks

- ◆ Quoting using CPQ is at a minimum a \$15K project. Integration (if necessary) is between \$12K and \$15K. FSL can be anywhere from \$15K to \$25K, so a full on solve all your problems, change the way you do business project for a Job Shop manufacturer can EASILY be over \$50K. We should walk into these projects with an understanding of the complexity and try and find the MOST painful point with the Prospect, and try to solve for that (first).
- ◆ Are we high enough? Most of these clients in our space are family owned, which means, that there is 1 or 2 people at the top who make all of the decisions. We need to make sure they are with us right from the beginning.
- ◆ A VP at Salesforce has an ingenious way to handle this. Make the first meeting after the Prospect is qualified to you a “**CXO/VP Introduction**”. Hold out for this meeting and don’t proceed until we get it. At the meeting, we do a broad overview of Salesforce as market leader, an explanation of CRM (sometimes the customer doesn’t know). This meeting also sometimes tells the prospect what we don’t do. For instance, we don’t do ERP! We don’t do production control, we don’t do warehousing!



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- ◆ Change is hard – is the prospect willing to undergo what will likely be monumental changes to their existing processes? They will need to be willing to change in order to reap the benefits of Salesforce – or any system really.
- ◆ Is their ERP System able to integrate? Of course Salesforce can, but we will need to understand the ERP landscape if we want to be bi-directional in our integration approach.

3. Trade Adjustment Assistance Centers (Money for our Prospects)

TAAC

Trade Adjustment Assistance Center (TAAC) is a non-profit, regional center that provides federal funding assistance for *manufacturing and service companies* that have been impacted by foreign competition. Basically, if your business is affected by importation (and the affect can be as little as 5%) then you can be approved for a Grant from the US Government to pay for Technology initiatives such as Salesforce.

Funding is provided to the TAAC by the U.S. Economic Development Administration through the Department of Commerce under the national Trade Adjustment Assistance (TAAF) for Firms program. (There are 11 dedicated TAAF centers nationwide)

Positioning this Assistance can be tricky, as it will delay the sales cycle, but **ESPECIALLY RIGHT NOW**, I think that this could really help us to find customers – and engage them in a sales cycle. This could give companies money to pay for technology, and get it up and going **WHILE** this coronavirus is paralyzing business. It gets us into Sales Cycles and helps us to talk to customers about the process.

Read about the [TAAC](#) offers here, and find your [local chapter here](#).